Quick Reference Guide to HR and ePAF

Resources refers to: RaiderLink > A&F Work Tools tab> AFISM channel, Resources > EPAF Filter & Sub Filter

Contents

Pay Plan: Texas Tech’s List of Job Titles, Pay Ranges, and Exempt/Nonexempt Status .................................................2
Faculty and Student Titles  .................................................................................................................................2
PAYROLL and the ePAF GOAL: Employee Checks are CORRECT!! .................................................................2
Pay Schedule: Month at a Glance format –or- PDF Annual List format ..............................................................2
Personnel Actions: 9 Terms to Memorize QUICKLY!! ........................................................................................2
FTE (Full Time Equivalency): Full-time, Part-time and Percent for Regular Work .............................................3
Calculate Hours Per Day and Hours Per Pay ....................................................................................................3
Definitions of Employees, Positions, and Jobs: 3 Terms to Understand NOW!! ................................................3
Comparing Exempt, Faculty, and Nonexempt New Hire ePAFs ........................................................................3
Resource Packets: Samples from Your Home Organization ..............................................................................3
12 ePAF Approval Categories for Employee Jobs, and 5 Groups of ePAFs ......................................................4
“Choosing an ePAF and Query Date” A Definition with Before & After Descriptions! ....................................4
Single Action ePAF Exercise ........................................................................................................................5
What is the “Official” Personnel Date and “Rule of Thumb”? ........................................................................5
ePAF Templates: A Guide with Entry by Entry Hints for Completing Each ePAF! .............................................5
Employee Pay, Leaves, and Earning Codes .........................................................................................................6
Employee One-time Payment System (EOPS) ....................................................................................................6
Dates for Official Employee Records ..............................................................................................................7
Academic Semesters: ........................................................................................................................................7
Exempt Employee Annual Salary for Semester Pay ..........................................................................................7
Convert Hours to, from Annual Salary ............................................................................................................7
New Position Request / Reclassification ...........................................................................................................8
Changing ONLY the Labor Distribution ........................................................................................................8
COMMENTS are for Explanations -- NOT for Instructions to HR or Payroll .....................................................8
Routing and Approving ePAFs, Tracking and eMail Notices ............................................................................8
Other Personnel Procedures ........................................................................................................................8
Assigning Roles: ePAF and HR Cognos Permission and Access .....................................................................9
ePAF Attachments: I-9 New Employee Packet and Other Employee Documents .........................................9
Considerations for Query Date Entry .............................................................................................................10
Choosing an ePAF and Query Date A Definition with Before & After Descriptions! ....................................10
Guidelines for Adjusting the Query Date ........................................................................................................11
Tips and Procedures for Starting an ePAF ..........................................................................................................12
Reminder: Multiple-action ePAFs Are MORE Complex!! ..............................................................................12

AFISM Resource Center:

- Phone Assistance (Help Desk): 2-KNOW (742-5669)
- Outlook Address (Help Desk): AFISM 2KNOW
- Registration System for AFISM Classes
- Training Materials, Job Aids, Video Tutorials
- Knowledge Base (Q&A, FAQ)
Pay Plan: Texas Tech’s List of Job Titles, Pay Ranges, and Exempt/Nonexempt Status

Pay Plan: RaiderLink > A&F Work Tools, Human Resources > Pay Plan > Classified Pay Plan

- Position Class (Title) Codes begin with (E)xecutive, (F)aculty, (S)taff, (U) Student, and (P)art-time
- Click the Title to find Texas Tech’s institutional job description and Employee Class code.
- Based on the FLSA (Fair Labor Standards Act), Texas Tech has three methods of employment:
  - EXEMPT
  - FACULTY/TA/GPTI
  - NONEXEMPT
- CAUTION: An employee cannot perform both Exempt and Nonexempt jobs simultaneously.

Faculty and Student Titles

Faculty Titles (Exempt 9 Mo): Professor, Instructor

Research Titles (Exempt 12 Mo): Principal Investigator, Co-Investigator, Sr. Research Associate, Research Associate, Research Assistant, usually paid from Sponsored Project Funds (starting with 21, 22, 23, 25B or the 11B State Research Fund managed by VP Research); also FOP Program Code 200.

Student Titles, Exempt and Nonexempt (Graduates must be fulltime students to qualify for the Job title)

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Non – Ex - Fac</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA Student Assistant</td>
<td>Undergraduate, admin or clerical duties</td>
<td></td>
</tr>
<tr>
<td>GA Graduate Assistant</td>
<td>FT Graduate Student, admin or clerical</td>
<td></td>
</tr>
<tr>
<td>TA Teaching Assistant</td>
<td>FT Graduate Student, &lt;18 hrs in discipline</td>
<td></td>
</tr>
<tr>
<td>GPTI Grad Part Time Instructor</td>
<td>FT Graduate Student, &gt;18 hrs in discipline</td>
<td></td>
</tr>
<tr>
<td>RA Research Assistant</td>
<td>FT Graduate Student, doing research</td>
<td></td>
</tr>
</tbody>
</table>

PAYROLL and the ePAF GOAL: Employee Checks are CORRECT!!

Pay Schedule: Month at a Glance format –or- PDF Annual List format

RaiderLink > Payroll & Tax tab >
(1) Administrative Links > Department End User Calendars > Choose a Month (At a Glance format)
(2) Employee > Resources > Scroll down to Pay Schedule (for list by Pay Period) PDF document.

Personnel Actions: 9 Terms to Memorize QUICKLY!!

An employment relationship begins on the first day of work and ends on the last day of work. The Primary Job (first or base job) defines the employment relationship with these codes:

Employee Class (ecls) designates categories of faculty and staff titles as hourly or salary status.
Benefit Category (bcat) designates the type(s) of benefits available for the position title.
Leave Category (lcat) designates the type(s) if leaves available for the position.

A Personnel Action is an employment decision, such as hiring, promoting, or terminating an employee. The Personnel Date on an ePAF is the “first (start)” or “final (end)” day of the Personnel Action.

An ePAF Approval Category is a electronic form that collects information about a personnel action, and is comprised of one or more sections referred to as Approval Types.
FTE (Full Time Equivalency): Full-time, Part-time and Percent for Regular Work

A 40-hour week is considered 1.0 FTE (full time). The formula is \(\text{work hours} \div 40 = \text{FTE}\)

Half-time (20 hours) is considered _____ FTE. 3 days a week is considered _____ FTE.

The student will work 7 hours in the lab ______ and 13 hours with the professor______.

Variations are:
- **Faculty:** each academic department determines FTE based on course load.
- **Students:** Students are considered fulltime as students and half-time or less as an employee.
- **Task workers (exempt):** usually are zero FTE and paid ‘additional compensation’ for the work performed.
- **Temporary workers (nonexempt):** 2 appointments - either (a) have an FTE paid semi-monthly by timesheet for several months, or (b) be 0.01 FTE paid ‘lump sum’ for work performed.
- **Non-Tech employees** have zero FTE, zero pay.
- **Retired Workers** have multiple considerations for FTE; contact HR Compensation Operations for guidance.

Calculate Hours Per Day and Hours Per Pay

1) **HOURS PER DAY** means average work hours per work day, adjusted by FTE for part-time.

2) **HOURS PER PAY** means average work hours per pay period, adjusted by FTE for part-time

   For a .3 FTE:  **Exempt** Hrs/Day _____ Hrs/Pay ______  **Nonexempt** Hrs/Day_____ Hrs/Pay _____

3) For a low FTE, the minimum “Hours per Day” is never less than one hour.

4) The formula for encumbrance calculation is hourly rate x hours per pay x remaining pay periods to the end of the fiscal year unless a job end date occurs first. (also recognizes leave status)

5) Encumbrances are not computed for nonexempt students (SA/GA).

6) Recasting is the nightly process to re-compute encumbrances.

**Definitions of Employees, Positions, and Jobs: 3 Terms to Understand NOW!!**

Matching Exercise: Can you match the correct definition to each term:

_____ Position?  
A. An R# appointed to a T# and suffix of 00.

_____ Employee?  
B. A work description, identified by a Title and T#.

_____ Job?  
C. A person identified by a Social Security Name and R#.

Comparing Exempt, Faculty, and Nonexempt New Hire ePAFs

Resource Packets: Samples from Your Home Organization

Does your department have other Organization Codes?
12 ePAF Approval Categories for Employee Jobs, and 5 Groups of ePAFs

**Resources** > Category Filter = ePAF & Sub-Category Filter = ePAF Calculators >

**“Choosing an ePAF & Query Date” and “Forms of Employee Pay (color)”**

**Primary Job ePAFs** are the first or base “work for pay” job indicated by FTE (workload: hours or courses taught).

1. **New Hire** for an employee coming to Texas Tech from another employer, or unemployment.
2. **Transfer Gaining** for an employee coming from another department.
3. **Job Change Begin** to re-start an employee’s primary job following a job end (promotion, demotion)

**Ending Jobs ePAFs** end the appointment of the employee.

4. **Termination** ends the primary job and the employee relationship with Texas Tech.
5. **Transfer Losing** ends the primary job when transferring to a new department.
6. **End Job** ends the primary job and keeps the employee assigned to the department.

**Secondary Jobs ePAFs** are labeled as:

7. **Add Secondary Job** is another “work for pay” job with FTE.
8. **Add Secondary Position** is “additional pay” above normal FTE (interim duties endowed professor).
9. **Primary Job Recurring Pay** is an “allowance” above normal FTE (phone or housing allowance).
10. **Retiree Returning to Work** is for a retired employee to work while retaining retirement status.

**Modifying Jobs ePAFs** (Modifying a current job):

11. **Pay Change** to increase or decrease the rate of pay (hourly rate or annual salary)
12. **FTE Change** to increase/decrease workload or work hours. Ex/Fac Salary must change proportionally!

### In Texas Tech: T, H, S, E

- **Within My Department**
  - # # # # # # # # #
  - # # # # # # # # #
  - # # # # # # # # #
  - # # # # # # # # #
  - # # # # # # # # #

### Multi-action ePAFS

- END / BEGIN
  - 1. # # # # # # # # # # # # # # # #
  - 2. # # # # # # # # # # # # # # # #
  - START / END
  - 3. # # # # # # # # # # # # # # # #
  - 4. # # # # # # # # # # # # # # # #
  - END PRIMARY & SECONDARY
  - 5. # # # # # # # # # # # # # # # #
  - 6. # # # # # # # # # # # # # # # #

“Choosing an ePAF and Query Date” A Definition with Before & After Descriptions!

**Resources** > Category Filter = ePAF & Sub-Category Filter = ePAF Reference documents >

“Choosing an ePAF and Query Date”
### Single Action ePAF Exercise

<table>
<thead>
<tr>
<th>Employment Decision</th>
<th>Approval Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>____ 1. Assigned to a second job title with FTE</td>
<td>A. New Hire</td>
</tr>
<tr>
<td>____ 2. Hire an employee from another department</td>
<td>B. Transfer Gaining</td>
</tr>
<tr>
<td>____ 3. Increase a student’s wage from 7.50 to 7.75</td>
<td>C. Job Change Begin</td>
</tr>
<tr>
<td>____ 4. Provide a car allowance</td>
<td>D. Add Secondary Job</td>
</tr>
<tr>
<td>____ 5. Fire an employee</td>
<td>E. Add Secondary Position</td>
</tr>
<tr>
<td>____ 6. End an employee’s job</td>
<td>F. Primary Job Recurring Pay</td>
</tr>
<tr>
<td>____ 7. Recognize a distinguished professor with additional pay</td>
<td>G. Pay Change</td>
</tr>
<tr>
<td>____ 8. Restart the primary job of an employee in your department</td>
<td>H. Retiree Return to Work</td>
</tr>
<tr>
<td>____ 9. One of your employees quits to work in another department</td>
<td>I. FTE Change</td>
</tr>
<tr>
<td>____ 10. Increase a student worker from 12 to 20 hours per week</td>
<td>J. Terminate Employee</td>
</tr>
<tr>
<td>____ 11. Hire a new employee from United Supermarkets</td>
<td>K. Transfer Losing</td>
</tr>
<tr>
<td>____ 12. A retired employee returns on a part-time basis</td>
<td>L. Job Change End</td>
</tr>
<tr>
<td>T F 13. The Multiple Action Approval Categories allow a department to submit two actions on one ePAF.</td>
<td></td>
</tr>
<tr>
<td>____ 14. In the list below, how many ePAFs have a Personnel Date of “Final Day”? (circle the ePAFs)</td>
<td></td>
</tr>
<tr>
<td>15. These “Final Day” ePAFs belong to which group on the previous page (4)? _____________________</td>
<td></td>
</tr>
</tbody>
</table>

---

**What is the “Official” Personnel Date and “Rule of Thumb”?**

A Personnel Action **EITHER** (starts or changes) a job status **-OR-** ends the job. It is the **first** or the **final day**! It is entered in the **“official” Personnel Date** field of each ePAF and is referred to as **THE DATE** of the ePAF!

**For this ePAF: **

<table>
<thead>
<tr>
<th>THE DATE (Personnel Date) is –</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire</td>
</tr>
<tr>
<td>Transfer Gaining</td>
</tr>
<tr>
<td>Job Change Begin</td>
</tr>
<tr>
<td>Add Secondary Job</td>
</tr>
<tr>
<td>Retiree Return to Work</td>
</tr>
<tr>
<td>Add Secondary Position</td>
</tr>
<tr>
<td>Primary Job Recurring Pay</td>
</tr>
<tr>
<td>Termination</td>
</tr>
<tr>
<td>Transfer Losing</td>
</tr>
<tr>
<td>Job Change End</td>
</tr>
<tr>
<td>Pay Change</td>
</tr>
<tr>
<td>Change FTE</td>
</tr>
</tbody>
</table>

**A “Rule of Thumb” about the Personnel Date on the 12 Single Action ePAFs: It is the “First Day” for every ePAF except the “Ending Job ePAFs”!!**

**ePAF Templates: A Guide with Entry by Entry Hints for Completing Each ePAF!**

*Resources > Category Filter = ePAF & Sub-Category Filter = Pick from the 5 ePAF groups:*

  * Primary, Secondary, Ending, Modifying, Multiple Action*
Employee Pay, Leaves, and Earning Codes

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents >
“Forms of Employee Pay (color)”
“Employee Pay: Earning Codes”

Earn Codes for Primary and Secondary ePAFs That Start Employee Pay:

Primary Job (FTE job entered on a New Hire, Transfer Gaining, or Job Change Begin):
- RGS (regular salary) or RGH (regular hourly) Earn Codes with Hours Per Pay, and no Special Rate.
  Longevity Eligibility (Full Time Staff only) where HLD = Yes and HLN = N; Unit of 1 and no Special Rate.
Secondary Job (FTE) has RGS or RGH Earn Codes with Hours Per Pay (no longevity); no Special Rate.
Secondary Position (additional pay) Earn Codes are on the Forms of Employee Pay and the ePAF Template, with Unit of 1.
Primary Job Recurring Pay (allowance) Earn Codes are on the Forms of Employee Pay and the ePAF Template, Unit of 1.

Class Exercise

A professor is recruited by Texas Tech. She will teach half-time and research half-time. She will be designated an endowed professor with additional pay, and be provided a car allowance.

<table>
<thead>
<tr>
<th>Employee Job: (to be paid for)</th>
<th>ePAF to Complete:</th>
<th>Earn Code for ePAF</th>
<th>Hours or Units</th>
<th>Special Rate? Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>a)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Jobs always have 2 codes!</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Employee One-time Payment System (EOPS)

EOPS App: RaiderLink > A&F Work Tools > Human Resources >“EOPS, Employee One-time Payment System”

Payments for tasks or short projects performed outside the employee’s normal job duties are submitted on an EOPS online form (not an ePAF) and electronically routed for approval. Payment to the employee will be included on the employee’s pay check (or direct deposit) once all approvals are completed.
Dates for Official Employee Records

The Original Hire Date occurs upon the first employment of a person, and the Current Hire Date refers to a rehire after a break in service.

The Termination Date is the last day of work or leave before a break in service, while the Last Day of Work refers to the last day of work and might be followed by a leave before Termination (leave cannot extend employment into the next pay period).

Academic Semesters: Standard semester begin and end dates for paying Faculty/TA/GPTI employees.

<table>
<thead>
<tr>
<th>Fall: 4.5 Months</th>
<th>Spring: 4.5 Months</th>
<th>Summer I 1.5 Months</th>
<th>Summer II 1.5 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 1 to Jan 15</td>
<td>Jan 16 to May 31</td>
<td>Jun 1 to Jul 15</td>
<td>Jul 16 to Aug 31</td>
</tr>
</tbody>
</table>

Academic Instruction Appointments during the Fiscal Year

1. During the 9 month academic year, Faculty/GPTI/TA appointments end on May 31.
2. All 9 month Faculty/GPTI/TAs are electronically placed on leave for June 1, returning August 31. (Some departments end GPTI/TA jobs) All other appointments continue uninterrupted.
3. While the primary job remains on summer leave, departments submit Summer ePAFs (Add Secondary FTE Job and End).

THE CHALLENGE: Academic departments ‘manage’ their salary budgets on a SEMESTER basis and think in terms of PAY to employees (semester salary budget), not the ANNUAL SALARY on the Faculty ePAF!

Appointing Work-Study Students

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents >

The “award” is the maximum student earnings where financial aid will pay 75% of the earnings and the department will pay 25% of the earnings, using a Financial Aid W# position. If the student will earn more than the award, then the department will pay 100% of the additional earnings, using department T# position. Financial Aid provides an Award authorization that includes the Award amount, the earnings period (semester), the work study FOAP, and the W# for paying the award.

Exempt Employee Annual Salary for Semester Pay

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Calculators > “Multipurpose Exempt Salary”

1) Tom, a TA will be paid $5000 to teach the Fall Semester (Reset Calculator?):
   Months to be paid ____  Ann Sal _______  Mon Sal _______  FTE ______

2) If he receives a $4400 Work Study Award (Reset Calculator?):
   T-Dept ePAF:   Months to be paid ____  Ann Sal _______  Mon Sal _______  FTE ______
   W-Award:     Months to be paid ____  Ann Sal _______  Mon Sal _______  FTE ______

3) Sue, a TA who will assume Dr. Jones class on March 1 to complete the semester for $3450 (Reset Calculator?):
   Months to be paid ____  Ann Sal _______  Mon Sal _______  FTE ______

Convert Hours to, from Annual Salary

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Calculators >

   Convert from “Annual Salary and FTE” to Hourly Rate
   Convert from Hourly Rate to “FTE and Annual Salary”

Convert a .5 FTE teaching assistant ($8750 annual) to nonexempt hourly ______________.
Convert a .5 FTE research assistant ($11,600 annual) to nonexempt hourly ______________.
A $12.50/hour, .5 FTE, converts to Exempt Annual __________ or Faculty Annual __________.

HR/ePAF Quick Ref Guide 2018 12
New Position Request / Reclassification


A New Position Request is an application to add a new position (T#) to the department.

A Reclassification is an application to modify an existing position by changing the title, etc.

Changing ONLY the Labor Distribution

When the labor expense is to be changed to a different budget, and there are no changes to title, pay, or FTE:

- The “Current & Future Labor Change, TLABOR ePAF” changes the labor distribution from now forward
- The “Labor Redistribution Form” changes pay in a previous (closed) pay period, retroactively

Forms: RaiderLink > A&F Work Tools > Budget > Forms

COMMENTS are for Explanations -- NOT for Instructions to HR or Payroll

A description of the employee action will assist the approvers when they review the ePAF. The ePAF’s only purpose is to collect information to update the employee record. It is not used for other procedures such as assigning payroll proxies and approvers.

Routing and Approving ePAFs, Tracking and eMail Notices

A Mandatory level is an approval level assigned to an ePAF, such as Department Head.
An Optional level refers to an approval level that can be added by the department when needed, such as Financial Aid for Work Study approval or Graduate School for GPTI/TA/RA/GA approval.

There are 3 methods available for routing ePAFs within your department:

A. The department can add levels 5-FYI and 10-PI. Email HR with names of approvers for those levels.
B. The department can duplicate any level (REMEMBER: Mandatory levels cannot be removed!).
C. Approver levels above 20 often have one approver who assigns colleagues as proxies.

eMail reminders are sent at 10am and 3pm for ePAFs in process (waiting completion or approval).
Monitor the progress of an ePAF by viewing the Approval Routing for action, date and time.

Other Personnel Procedures

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents > (find the guide)

Appointing a Non-Tech Employee, for an individual who works on campus but is paid by another employer.

Full Time Exempt Non-Faculty Employees Teaching Classes, for the full time staff (such as the Chancellor, President, etc) who teach an academic class.

Manual Check Procedures (for Missed Pay Periods)

Forms: RaiderLink > A&F Work Tools > Payroll & Tax tab > Administrative Resources, Payroll Forms:
“Manual Check Request – Exempt Forms” (Instructions are available)
“Manual Check Request – Non-Exempt Forms” (Instructions are available)

A manual check request is submitted when an employee misses a pay check. The employee must have an active job or the form will be returned. Only one pay period may be submitted on a Manual Check Request.

Manual Check Requests received by Friday will be paid on the following Friday with a paper check to be picked up in the Payroll Office.
Assigning Roles: ePAF and HR Cognos Permission and Access

Resources > “Managing Your Originator Summary”
Resources > “Managing Your Approver Summary”
Resources > “Proxy Navigation”

- A “role” is created by granting permission to access online date for an organization.
  1. **EPAF Originator** role is granted upon completion of the All About HR and ePAF training.
  2. **ePAF Approver** role is granted by organization managers, using TEAM App.
  3. **HR Cognos** role is granted by organization managers, using TEAM App. **Takes overnight to be active!!**
  4. **WTEWL Approver** role is granted by organization managers, using TEAM App.
  5. **WTEWL Proxy** role is granted by organization managers to assign WTEWL approvers, using TEAM App.

- **TEAM App** is the application used by organization managers (dept head; finance mgr) to assign roles.
- **Operating Policy OP 70.40** describes guidelines and consequences regarding employee confidentiality.

**ePAF Attachments: I-9 New Employee Packet and Other Employee Documents**

New Employee Procedures and Packet: RaiderLink > A&F Work Tools, Visit HR Website > Employee Resources >
“Before Your First Day, New Employee Packet”

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents >
“ePAF Attachment Instructions” see page 15 for Required Attachments.

The preferred file format is pdf.
The I9 New Employee Packet (NEP) must be attached as one file; Document Type is I9 New Employee Packet.
All other documents must be attached in one file; Document Type is Other ePAF Attachments.

1. **Exit Import.**

3. **Use the Arrows or Page List to choose which page is “visible” for attaching to the ePAF.**

4. Choose a DOCUMENT TYPE and SAVE; the visible page will be the 1st page of the attachment.

   Do not enter Tech ID, First/Last Names or Eff Date.

5. Attach the visible page (a single page is attached), or
   Attach all pages in the In-box (in the order of the In-box).
**Considerations for Query Date Entry**

*Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents > “HR/ePAF Date Glossary” & “Date Reminders for ePAF Groups” & “Choosing an ePAF & Query Date”*

**The General “Rule of Thumb”**  For an ePAF prepared in advance (and approved by the Due Date of the desired pay period), put the Personnel Date (begin’ first’ day or end ‘last day) in the Query Date entry.

The Query Date for an ePAF coordinates the data updating of employee records. The entry made in the Query Date field defaults to the Effective Dates of the different Approval Types, acting as a date coordinator for the different updates to the system. The Query Date for ‘late ePAFs’ must be consistent with other date constraints!

**Considerations “Before” Starting an ePAF:**

1. The Query Date field is populated with “today’s date” and must be replaced, most frequently with the Personnel Date (the date a job starts or ends).
2. If a previous ePAF has applied to the system to become active on a future date, the new ePAF cannot be inserted earlier than the future date: See the Future Dated Record guidelines.
3. For an ePAF that starts a new job, following a previous end job ePAF, the Query Date must be after the previous End Date: See the End Date guidelines.
4. The Query Date for an action that occurred in an earlier pay period must respect the Last Paid Date (pay period end date after Payroll prepares pay checks). Please follow Last Paid Date guidelines.

**Considerations for Last-minute or Late ePAFs:**

- The ePAF must be approved by the ePAF Due Date for the pay period. Please follow ePAF Due Date guidelines.
- If the late ePAF will result in over- or under-payment to the employee, the department must take manual steps to correct employee pay. Please follow Manual Pay Correction guidelines.

**Choosing an ePAF and Query Date  A Definition with Before & After Descriptions!**

*Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents > “Choosing an ePAF and Query Date”*
Guidelines for Adjusting the Query Date

Do You Remember?  The following guidelines are easier to understand if you remember: (from pages 2 & 5)

The Personnel Date refers to either the ‘first’ (beginning) day when starting an action or the ‘final’ (ending) day when ending a job.

The 12 Single Action ePAFs can be grouped as follows, with similar date guidelines for each group: (page 4)

- Primary Job ePAFs
- Secondary Job ePAFs
- Ending Job ePAFs
- Modifying Job ePAFs

Future Dated Records.  A future dated record exists (including job ends) that conflicts with the new ePAF.  Contact HR Compensation Operations for assistance.

Due Date  A new ePAF must be approved by this date to be included in the pay period.  If the new ePAF is not included, the employee’s pay may be incorrect.

- FTE/Pay Change ePAFs will be returned to be dated for the next period, and the department must take manual steps to correct employee pay.  Please follow Manual Pay Correction guidelines.
- All other ePAFs will apply after the ePAF Due Date (are not returned for date changes); the employee’s record will not be updated; and the department must take manual steps to correct employee pay.  Please follow Manual Pay Correction guidelines.

End Date  The Query Date for the new ePAF may be adjusted as follows

- For starting a new job or FTE/Pay Change, the Query Date must be after the end date, and the department must take manual steps to correct employee pay, if needed.  Please follow Manual Pay Correction guidelines.
- For ending a job, the Query Date can be on or after the end date, and the department must take manual steps to correct employee pay, if needed.  Please follow Manual Pay Correction guidelines.

Last Paid Date  (NOT Payday, not when the employee receives the pay check)  This is the last day of the pay period; employee checks have been generated; the Query Date may be adjusted as follows:

- For starting a new job or FTE/Pay Change, the Query Date must be after the Last Paid Date, and the department must take manual steps to correct employee pay, if needed.  Please follow Manual Pay Correction guidelines.
- For ending a job, the Query Date can be on or after the Last Paid Date, and the department must take manual steps to correct employee pay, if needed.  Please follow Manual Pay Correction guidelines.

Manual Pay Correction  When the ePAF is late and employee pay is incorrect:

- For starting jobs, any employee may be underpaid – A Manual Check Request (MCR) must be prepared for each pay period back to the Personnel Date, after the ePAF updates the system.
- When ending jobs, an exempt person might be overpaid – Contact HR Compensation Operations for assistance.
Tips and Procedures for Starting an ePAF

Resources > Category Filter = ePAF & Sub-Category Filter = ePAF Reference Documents >
“Starting a New ePAF”
“ePAF Tips and Tricks: Condensed Guide”

1. SEARCHING: Enter an R# to retrieve the employee name (never type the employee name here) –OR– click the hourglass to search – OR – click the little person to request an R# if one is not found in the database.
2. The Query Date loads today’s date and is usually overtyped with the Personnel Date.
3. Selecting an Approval Category causes the employee’s current job(s) to display.
4. An ALL JOBS button will retrieve the employee’s history of jobs, then is renamed ACTIVE JOBS to return.
5. What 2 screens must be completed before an ePAF will open to enter a job?
   ___________________________ and ___________________________
6. On the job selection screen, click the NEXT APPROVAL TYPE button to build an ePAF, and visually verify
   • The Approval Type title on the top of the job chart
   • The correct job row is selected (the Job Labor Distribution is the last APPROVAL TYPE)
   • Then click GO.
7. When the ePAF opens for entry, how can you visually verify if it built correctly?
   ___________________________
8. Occasionally, if the ePAF is a transfer gaining or the rehire (new hire) of a previous employee, the system will present an Address Selection screen that presents the previous employee work address: ALWAYS verify the ‘Texas Tech Work Address’ is selected and click GO.
9. What do these buttons do: VOID ___________________________
    DELETE ___________________________
10. The system messages above the employee name and ID, or creates a chart of errors where
    • ERROR means an entry must be corrected before the ePAF will submit
    • WARNING* means an entry is questioned and should be reviewed
11. A different error chart is created when you click _________ versus ___________
12. Where do you find field-by-field hints for opening and completing an ePAF?
13. In the Originator Summary, the “Default Routing Queue” link will allow you to

Reminder: Multiple-action ePAFs Are MORE Complex!!

• Two Actions, and each has a Personnel Action Date!!
• Two Actions may mean two T-positions!! Building the ePAF using the [Next Approval Type] key must match the T-position with the correct Approval Type!!
• Sometimes, the Query Date relates to one action, sometimes to both!!

Resources for Your Success:
Phone: 2-KNOW (5669)
Email: AFISM 2KNOW
AFISM’s Knowledge Base (FAQs)
TEXAS TECH UNIVERSITY

CONFIDENTIALITY STATEMENT

I agree to hold as strictly confidential all Texas Tech University System information regarding personnel and/or student records, communications, and activities and all other information made confidential by TTU policy or law (including, but not limited to, the Family Educational Rights and Privacy Act of 1974 and the Gramm-Leach-Bliley Act of 1999) to which I have access or obtain as faculty, employee, student, agent, representative or affiliate of TTU.

I agree that I will not read or otherwise gain access to such confidential information except as required to perform my duties and responsibilities at TTU. Further, unless disclosure is authorized or required by law, I agree that I will not disclose any such confidential information now or at any time in the future, either directly or indirectly, except as required to perform my duties and responsibilities at TTU and, then, only to the extent disclosure is consistent with the authorized purpose for which the information was obtained.

I agree to handle all confidential information, whether written, computerized, oral or in some other form, in such a way that it shall not be inadvertently revealed or disclosed to any other person. Except as authorized by my responsibilities and duties, I agree that I will not maintain for my files any permanent record that contains confidential information and will provide for the complete destruction of any rough drafts or unofficial copies of confidential information.

I acknowledge and agree that any breach of the Confidentiality Agreement by me may result in disciplinary action, consistent with Texas Tech University policy, up to and including termination of employment; further, I understand that such a breach may result in legal action.

The terms of this Confidentiality Agreement are effective immediately and apply to all confidential information I have attained in the past as well as future information. I understand that this document will become a part of my permanent personnel and/or student record.

__________________________________________  _________________________
Signature of Faculty, Employee, Student, or Affiliate       Date

__________________________________________
Printed Name, R#                                      Witness

HR/ePAF Class